

Orion Weekly Roundup: April 2, 2021



The markets may be closed today, but we're still hard at work to make sure you don't miss any important news from this week.

Why New RIA Firms Need Marketing

As a new RIA firm, you have to get a good grip on your brand story.

Your brand story is your message. It's how you talk to clients (new and old) about the value that you can bring to their lives.

As you work to develop your brand story, we think that financial planning and the role it plays in an investor's investment goals should be front and center.

In this blog, we look at how to tie your marketing and financial planning together in a way that resonates with your ideal clients.

[Read it here.](#)

Orion Expands Integration with BNY Mellon | Pershing

What's a better way to go into the weekend than with some integration news?
????

This new bi-directional single-sign on integration between Pershing's professional workstation, NetX360 and Orion Connect allows advisors to navigate seamlessly through both platforms with one login.

Included in this update is an at-a-glance view of important custodial documents in the Orion Client Portal.

Get all the details.

Rusty's Market Recap

What do you need to know about the markets last week and this week? Rusty Vannemann, CFA, CMT* and Chief Investment Strategist at Orion Portfolio Solutions, has you covered.

Rusty's recap includes a look at some impressive one-year returns (the S&P 500 was the strongest since the 1930s).

But there are still pressures on the market. Technically, it's still "overbought" right now.

Non-farm payroll comes out today. Keep an eye on how that affects unemployment numbers.

Read all of Rusty's insights here.

Ready to Watch and Learn? We keep a library of on-demand webinars. **Click here** to watch one whenever you'd like!

1136-OAT-04/05/2021

**The CFA® is a globally respected, graduate-level investment credential established in 1962 and awarded by CFA Institute — the largest global association of investment professionals. To learn more about the CFA charter, visit www.cfainstitute.org.*

The CMT Program demonstrates mastery of a core body of knowledge of investment risk in portfolio management. The Chartered Market Technician® (CMT) designation marks the highest education within the discipline and is the preeminent designation for practitioners of technical analysis worldwide. To learn more about the CMT, visit <https://cmtassociation.org/>.